

Job Aid: How to Approve Documents

This Job Aid shows how to:

- Access “ready for approval” documents
- Approve, disapprove and cancel documents routed for approval
- Add additional approvers to an approval path

Of Special Note:

When a document is submitted for approval, COMMBUYS determines which users must approve the document based on the approval path criteria established by Organization Administrators. COMMBUYS then notifies each approver via email once it is their turn to approve a document. Documents requiring approval can be found in the user's Control Center in the Approval tab waiting their review. Additional approvers may also be added manually by the user submitting a document, or any of that document's approvers.

Screenshot



Welcome To **COMMBUYS**

COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

COMMBUYS INFORMATION:
For more information on COMMBUYS please visit the [COMMBUYS](#) support pages.
[Training and Registration for Purchasers](#)
[Training and Registration for Sellers](#)
[Job Aids for Purchasers](#)
[Job Aids for Sellers](#)

If you have any questions or concerns contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197.

- [Register](#)
Register here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to registering.
- [Complete Registration](#)
Complete registration here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to completing registration.
- [Open Bids](#)
Browse open bid opportunities.
- [Active Contracts](#)
Browse active Contracts/Blankets.
- [Contract & Bid Search](#)
Search for Bids and active Contracts/Blankets.
- [Registered Vendor Search](#)
Search for registered vendors.

Login ID:
 Password:

[Forgot your password?](#)

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Directions

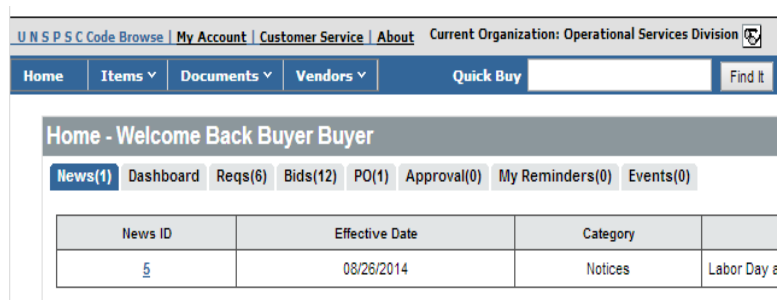
1. Launch the COMMBUYS Web site by entering the URL <https://www.commbuys.com/bsol> in the Browser.

Enter your login credentials and click the **Login** button on the COMMBUYS home page.

2. Your **Control Center** displays; make sure you are in either Basic Purchasing or Department Access user role.

When a document is ready for your approval, it appears on the Approval tab in the control center of your Homepage once it is your turn to review (after prior Approvers listed on the Approval Path, if applicable).

Click the **Approval** tab on your Control Center.



UNSPSC Code Browse | My Account | Customer Service | About | Current Organization: Operational Services Division

Home | Items | Documents | Vendors | Quick Buy | Find It

Home - Welcome Back Buyer Buyer

News(1) | Dashboard | Reqs(6) | Bids(12) | PO(1) | Approval(0) | My Reminders(0) | Events(0)

News ID	Effective Date	Category	
5	08/26/2014	Notices	Labor Day

Job Aid:

How to Approve Documents

Screenshot

Home - Welcome Back Alyssa Arnold

News(1) Dashboard Reqs(20) Bids(30) POs(1) **Approval(5)** My Reminders(0) Events(0)

My Documents Pending Approval

Requisition #	Requisition Date	Description	Approval Requested	Approver	Approval Status	Date Approved
1400108	12/02/2013	Catalog	12/02/2013 04:45:37 PM	Test User	Waiting...	
1400105	12/02/2013	Quick Buy Requisition	12/02/2013 04:27:21 PM	Test User	Waiting...	
1400104	12/02/2013	Test Requisition for Approval 2	12/02/2013 03:19:02 PM	Test User	Waiting...	
1300109	11/02/2013	Chocolate cake	11/02/2013 05:02:39 PM 11/02/2013 05:02:39 PM 12/02/2013 11:51:37 AM	Alyssa Arnold Tina Urato Buyer Buyer	Approved Waiting...	12/02/2013 12:13:47 PM
1400105	11/06/2013	Quotes	11/06/2013 02:15:20 PM	Buyer Buyer	Waiting...	

[View More...](#)

Purchase Order #	Change Order #	Purchase Order Date	Description	Approval Requested	Approver	Approval Status	Date Approved
0000109	1	12/03/2013	Test	12/03/2013 04:11:50 PM	Buyer Buyer	Waiting...	
0000108	1	12/02/2013	Thanksgiving Dinner	12/03/2013 03:43:54 PM 12/03/2013 03:43:54 PM	Linda Banks-Grant Buyer Buyer	Approved Waiting...	12/03/2013 03:47:14 PM

Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
1400286	01/06/2014	Quick Buy Requisition	14	Release	Linda Banks-Grant	PURCH / LOC1	\$24.00

[List & Approve](#)

Directions

3. Scroll to the bottom of the screen to the **Documents Pending My Approval** section.

This section displays the list of all documents submitted by other users that require your approval in order to proceed.

Documents within this section are separated by document type.

Selecting the document number link on the left side of the screen will open the document and allow you to review it, and then decide whether to approve, disapprove or cancel the document.

4. In this example (approving a Requisition), click the blue hyperlink in the **Requisition #** column to open the **Summary Tab** of the desired document.

5. The **Summary Tab** for all documents contains Header and Item information sections that display details of the document.

Review all the information on the **Summary** tab for accuracy. You can also click into any tab to review information.

Any notes and files attached to the document will appear along the bottom of the Header information section.

Scroll to the bottom of the page to add more approvers, approve, disapprove, or cancel the document.

Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year
1400286	01/06/2014	Quick Buy Requisition	14
List & Approve			

Release Requisition 1400286 STATUS: RELEASE - Ready for Approval

General Items Vendors Address Accounting Routing Attachments(1) Notes(1) Reminders(1) **Summary**

Header Information

Requisition Number: 1400286	Short Description: Quick Buy Requisition	Status: 1954 - Ready for Approval
Organization: Operational Services Division	Location: LOC1 - Compton	Required By Date: 01/06/2014
Department: PURCH - Central Purchasing	Requisition Type: Release	Type Code:
Entered Date: 01/06/2014	Purchaser: Melissa Morrison	Fiscal Year: 2014
Requestor: Linda Banks-Grant	Contact Phone: (617)655-5555	Alternate ID:
Contact: Linda Banks-Grant	Estimated Cost: \$24.00	Print Format:
Paard Enabled: No		
Solicitation Enabled: No		
Invoice Method: Three Way Match		
Ship-to Address: Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accutone.com Phone: (617)889-9999	Bill-to Address: 211 E 7th Street Suite 1100 Austin, TX 78701 US Email: support@operativediv.com Phone: (512)472-9100	

Notes: Sample note to procurement officer.

Attachments: [attachment](#)

Agency Files:

Agency Forms:

Vendor Files:

Vendor Forms:

Reminder List

Due Date	Comment	Remind Whom	Days Prior to Remind	Date Completed	Date Entered	Entered By
01/07/2014	Add reminder	Linda Banks-Grant	1		01/06/2014 04:27:11 PM	Linda Banks-Grant

Job Aid:

How to Approve Documents

Screenshot

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved/Canceled
	Alyssa Arnold	1	022	0	Primary	01/06/2014 06:23:27 PM	
	Linda Banks-Grant	1	022	0	Alternative	01/06/2014 06:23:27 PM	
Add New	<input type="text"/>	<input type="text"/>			Primary		

Approval Actions

Options: ☒ Approve ☐ Disapprove ☐ Cancel Requisition

Comment:

Directions

6. In the Approval Actions section of the **Summary Tab**, the approval options will appear, allowing you to approve, disapprove, or cancel the document.

A comment field is available for you to add additional information.

If a document is disapproved or cancelled, you must provide a reason in the Comment Field.

7. View the approval path information in the **Approval Path** section of the **Summary tab**. This section displays all approvers who must review and approve the document, and the order in which they must approve it.

If other approvers approved the document before you, a date and time will appear in the Date Approved/Disapproved/Canceled column in the row for that approver.

If a person is not on the approval path who you believe should review the document, you can add them by selecting their name from the dropdown box next to the **Add New** field in the Approver column, assigning them an Order Sequence, and clicking the **Add/Delete Approver** button.

Note that you will only be able to add approvers to the end of the existing approval path. If you would like to remove an approver you've added, you can click the checkbox in the Delete column and click the **Add/Delete Approver** button.

To approve, click the Approve radio button in the Approval Actions section, then click the **Save & Exit** button.

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved/Canceled
	Alyssa Arnold	1	022	0	Primary	01/06/2014 06:23:27 PM	
	Linda Banks-Grant	1	022	0	Alternative	01/06/2014 06:23:27 PM	
Add New	<input type="text"/>	<input type="text"/>			Primary		

Approval Actions

Options: ☒ Approve ☐ Disapprove ☐ Cancel Requisition

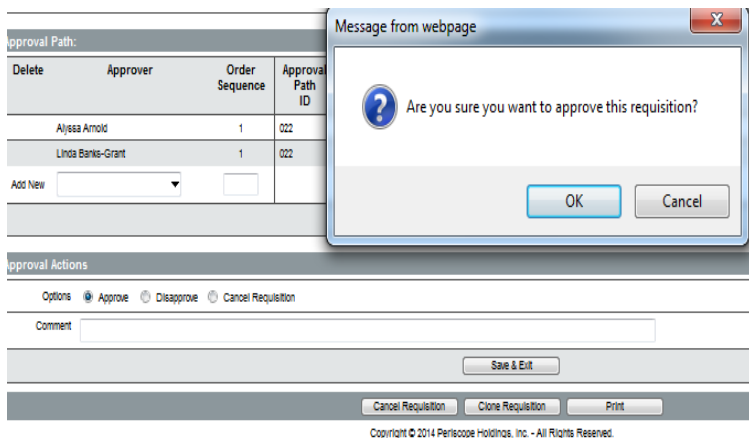
Comment:

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Job Aid:

How to Approve Documents

Screenshot



The screenshot shows the 'Approval Path' table with the following data:

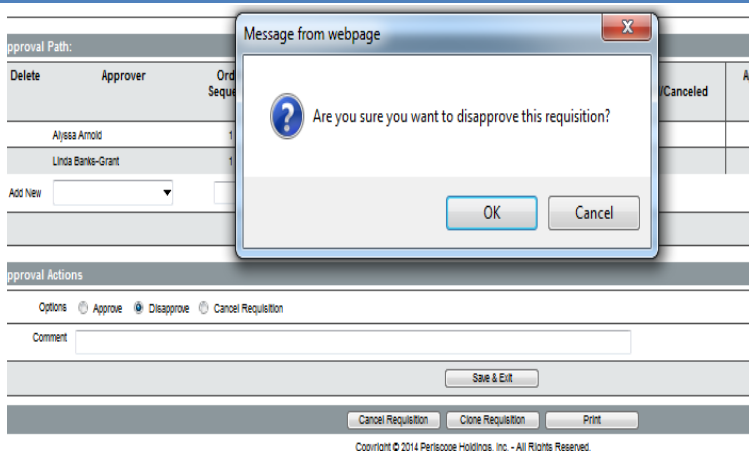
Delete	Approver	Order Sequence	Approval Path ID
	Alyssa Arnold	1	022
	Linda Banks-Grant	1	022

Below the table is an 'Add New' button. The 'Approval Actions' section shows the 'Approve' radio button selected. A 'Message from webpage' dialog box is open, asking 'Are you sure you want to approve this requisition?' with 'OK' and 'Cancel' buttons.

Directions

9. After you click the **Save & Exit** button a warning message appears.

If ready to approve click the **OK** button.



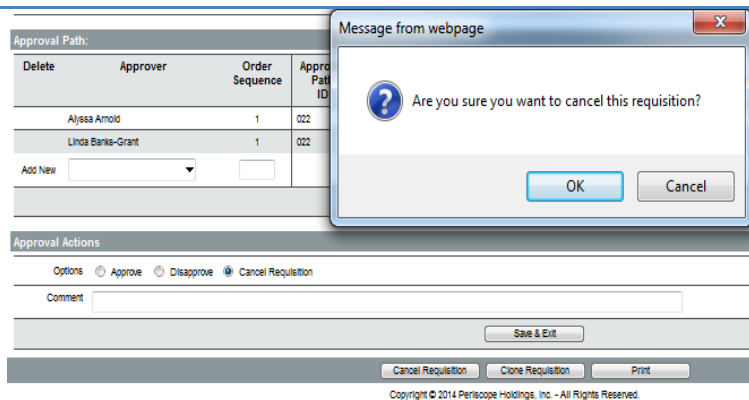
The screenshot shows the 'Approval Path' table with the same data as the previous screenshot. The 'Approval Actions' section shows the 'Disapprove' radio button selected. A 'Message from webpage' dialog box is open, asking 'Are you sure you want to disapprove this requisition?' with 'OK' and 'Cancel' buttons.

10. To disapprove a document, click the **Disapprove** radio button and click the Save & Exit button.

COMMBUYS displays a popup screen asking "Are you sure you want to disapprove this requisition?"

If the answer is yes, click the **OK** button and COMMBUYS will send the document back to the creator.

Note: Always include a comment/reason for the item that is disapproved.



The screenshot shows the 'Approval Path' table with the same data as the previous screenshots. The 'Approval Actions' section shows the 'Cancel Requisition' radio button selected. A 'Message from webpage' dialog box is open, asking 'Are you sure you want to cancel this requisition?' with 'OK' and 'Cancel' buttons.

11. To cancel a document, click the **Cancel** radio button and click the **Save & Continue** button.

COMMBUYS will ask "Are you sure you want to cancel this requisition?"

If the answer is yes, click the **OK** button and COMMBUYS will move the document into canceled status.

Canceled documents require a comment.

Job Aid: How to Approve Documents

Screenshot

Home - Welcome Back Alyssa Arnold

News(1) Dashboard Reqs(4) Bids(3) POs Approval(10) My Reminders(0) Events(0)

My Documents Pending Approval

Requisition #	Requisition Date	Description	Approval Requested	Approver	Approval Status	Date Approved
148013	12/02/2013	Catalog	12/02/2013 04:45:37 PM	Test User	Waiting...	
148015	12/02/2013	Quick Buy Requisition	12/02/2013 04:27:21 PM	Test User	Waiting...	
148014	12/02/2013	Test Requisition for Approval2	12/02/2013 01:19:02 PM	Test User	Waiting...	
1300129	11/22/2013	Chocolate cake	11/22/2013 05:02:36 PM 11/22/2013 05:02:36 PM 12/02/2013 11:51:37 AM	Alyssa Arnold Tina Grato Buyer Buyer	Approved Waiting...	12/02/2013 12:10:47 PM
148015	11/06/2013	Outlets	11/06/2013 02:15:20 PM	Buyer Buyer	Waiting...	

[View More...](#)

Purchase Order #	Purchase Order Date	Description	Approval Requested	Approver	Approval Status	Date Approved
0000202	01/13/2014	Testing	01/13/2014 03:32:24 PM	Alyssa Arnold	Waiting...	

Purchase Order #	Change Order #	Purchase Order Date	Description	Approval Requested	Approver	Approval Status	Date Approved
0000119	1	12/03/2013	Test	12/03/2013 04:11:53 PM	Buyer Buyer	Waiting...	

Documents Pending My Approval

Purchase Order #	Purchase Order Date	Description	Account Fiscal Year	Purchaser	Dept/Loc	Total
0000202	01/13/2014	Testing	14	Alyssa Arnold	PURCH/LOC1	\$110.00

[List & Approve](#)

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Directions

12. On the Control Center / Home page, find the heading **Documents Pending My Approval**.

Documents are separated by type:
Requisitions, Bids and Purchase Orders.

At the bottom center, there is a link called **List & Approve**.

Click **List & Approve** to go directly to the screen on the next slide.

13. This is another option for you to use to approve, disapprove or cancel the document. Also, a comment field has been added for you to add any additional information.

Use the checkboxes to choose which documents are being approved, disapproved or canceled.

To select all, click the **Select** checkbox in the Select column heading.

Note: Only use this option after documents for approval are reviewed.

14. Click the **Apply Approval Action to Selected** button.

A popup message will ask if you are sure of your action. If so, click the **OK** button.

Purchase Orders Pending My Approval

Master Blanket(1)

Select	Purchase Order #	Purchase Order Date	Description	Account Fiscal Year	Purchaser	Dept/Loc	Total
<input type="checkbox"/>	0000202	01/13/2014	Testing	14	Alyssa Arnold	PURCH/LOC1	\$110.00

Approve Action: ☒ Approve ☐ Disapprove ☐ Cancel Purchase Orders

Comment:

[Apply Approval Action to Selected](#) [Reset](#) [Cancel & Exit](#)

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P S C Code Browse | My Account | Customer Service | About

Current Organization: Operational Services Division

Items Documents Vendors Quick Buy Find It

Purchase Orders Pending My Approval

Master Blanket(1)

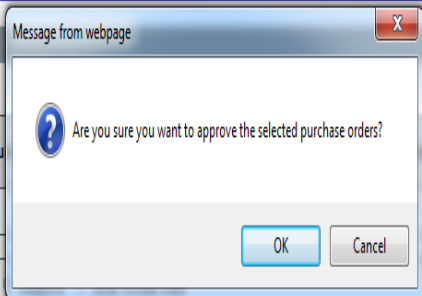
Select	Purchase Order #	Purchase Order Date	Description	Account Fiscal Year	Purchaser	Dept/Loc	Total
<input checked="" type="checkbox"/>	0000202	01/13/2014	Testing	14	Alyssa Arnold	PURCH/LOC1	\$110.00

Approve Action: ☒ Approve ☐ Disapprove ☐ Cancel Purchase Orders

Comment:

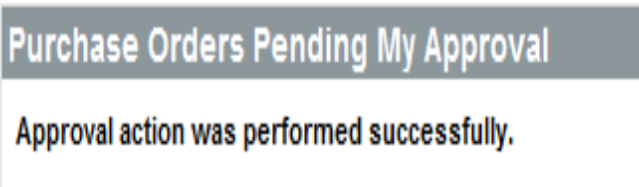
[Apply Approval Action to Selected](#) [Reset](#) [Cancel & Exit](#)

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How to Approve Documents

Screenshot	Directions
 <p>The screenshot shows a web interface with a header 'Purchase Orders Pending My Approval' in a grey box. Below it, a message states 'Approval action was performed successfully.'</p>	<p>15. This final screen demonstrates that the approval has been executed correctly.</p> <p>The Routing and Summary tab of each document will show internal users the history of who approved the document and at which date and time, and can be used for reporting to identify opportunities for improved efficiency.</p> <p>Please note that if a Proxy user approves on behalf of a user who has assigned this responsibility to them, this approval history will show the proxy approved on behalf of the normal approver.</p>